

For general guidance on how to move around the system see Appendix A.


To complete and submit a claim, follow the steps below.

## OVERVIEW

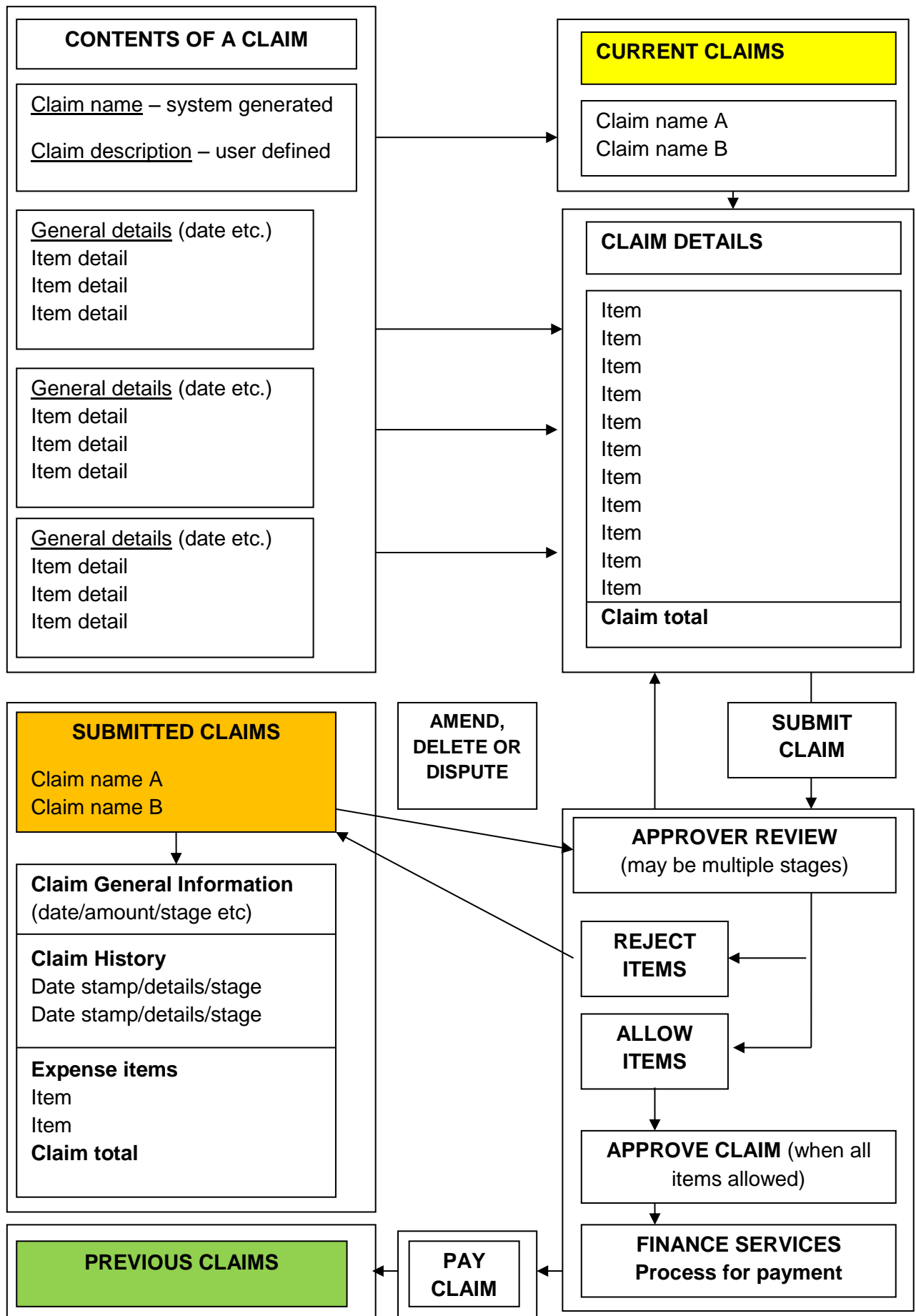
Claim submission consists of the following key steps.

- |        |  |
|--------|--|
| STEP 1 | Log on to Expenses at<br><a href="https://www.sel-expenses.com/shared/logon.aspx">https://www.sel-expenses.com/shared/logon.aspx</a> |
| STEP 2 | Start a CLAIM  |
| STEP 3 | ADD NEW EXPENSES to your claim<br><br>Complete general details<br>Add individual items of expenditure<br>Add mileage claims          |
| STEP 4 | Review your claim under CLAIM DETAILS  |
| STEP 5 | ADD additional items or ADD a NEW CLAIM  |
| STEP 6 | PRINT your claim (unless mileage only) and attach receipts   |
| STEP 7 | SUBMIT your claim  |
| STEP 8 | Send printed claim and attached receipts to the designated person or finance team in your College/Service                            |
| STEP 9 | Review RETURNED items – delete, amend or resubmit  |

Further information on each step is set out on the following pages.

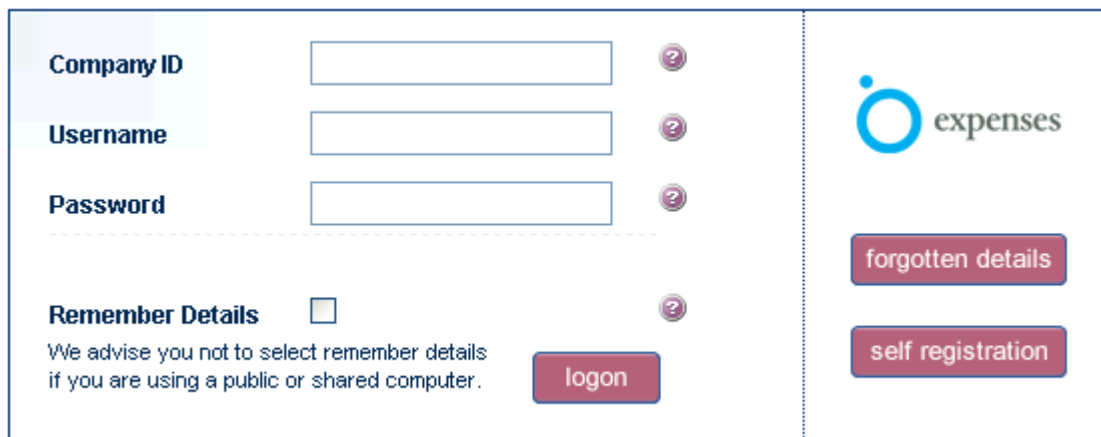
As you work through your claim, whenever you see this symbol  on the screen, click on it for helpful tips on individual fields.

## UNDERSTANDING THE CLAIM PROCESS FROM THE CLAIMANT'S VIEWPOINT



## STEP 1 – LOG ON

Access on-line expenses system at <https://www.sel-expenses.com/shared/logon.aspx>



The login page features a form with three input fields: 'Company ID', 'Username', and 'Password'. Each field has a small question mark icon to its right. Below the 'Password' field is a 'Remember Details' checkbox. A note below the checkbox states: 'We advise you not to select remember details if you are using a public or shared computer.' To the right of the form is a vertical dashed line, followed by the 'expenses' logo (a blue circle with a dot inside) and the word 'expenses'. Below the logo are two buttons: 'forgotten details' and 'self registration'. At the bottom of the form is a 'logon' button.

Enter Company ID: **UOE** (not case sensitive)

Enter Username: **University user ID** (not case sensitive)

Enter Password: **this is what you set up when you received the notification email**  
(click forgotten details if you have forgotten your password – a new password will be sent by email)

## STEP 2 – ADD NEW EXPENSES (select from menu icons)

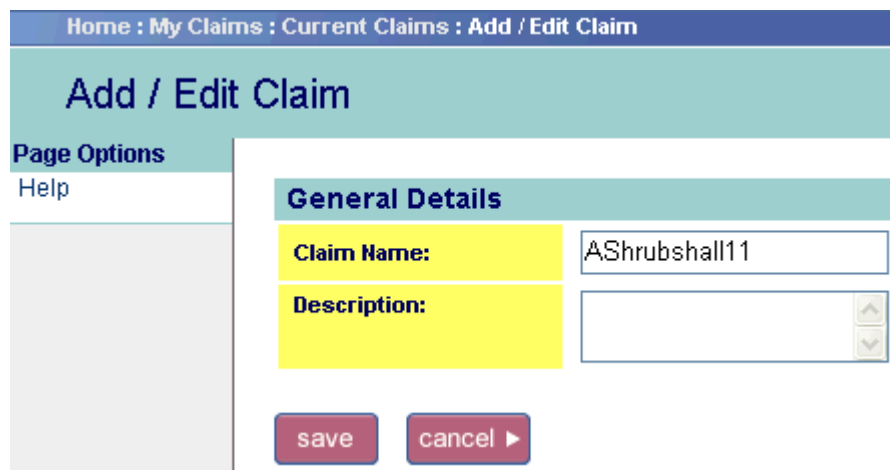


### Add New Expenses

Add new entries to current claims for any expenses you have incurred. If a current claim does not exist one will be created.

### First claim or no other claims in progress

If this is the first claim you have made or there are no other claims in progress a **Claim name** will be generated automatically:



The form is titled 'Add / Edit Claim' and has a breadcrumb trail: 'Home : My Claims : Current Claims : Add / Edit Claim'. On the left is a 'Page Options' sidebar with a 'Help' link. The main form area has a 'General Details' section with two fields: 'Claim Name:' (containing 'AShrubshall11') and 'Description:' (empty). At the bottom are 'save' and 'cancel' buttons.

In the **Description** box enter something that will allow you to identify what the claim is about when you are viewing claim lists. You can include as many items as you like under a single claim but you may wish to compile a claim for specific groups of items.

Suggested example descriptions are:

June 2014                                      Research project 04592 July 2014  
AUG Conference May 2014              Mileage August 2014

This shows you what you will see in a claim list so you can see it is important that the claim description is meaningful to you when you have a number of claims showing.

Claim Name	Claim Description	Num Items	Claim Total
AShrubshall10	June 2012	0	

When you have entered an appropriate description for the claim click **SAVE** to be taken through to the claim items page.

### STEP 3 – ADD EXPENSE ITEMS

The expense item page consists of:

- General details
- Individual expense items

#### STEP 3A – General Details

When putting a claim together you can add a number of items at the same time but they must all relate to the same general details at the top.

Enter the **Date** of the item or items being claimed or select from the calendar. If typing the date there is no need to enter separators – these are automatic. The date format is DD/MM/YYYY.

Select a **Reason** for claiming the items from the drop down list. This is for reporting purposes and is mandatory. It is important that you select the most appropriate reason, distinguishing in particular between externally funded research and non-research grants/projects.

The default **Country** is **United Kingdom**. Select the appropriate country from the drop down list for where the expense was incurred. This does not necessarily mean that you paid in a different currency. Typing the first letter of the country will bring up the first possible name. Repeating the letter will scroll through the names.

The default currency is **Pound Sterling** – if the expense was paid for in another currency select from the list. Typing the first letter of the currency will bring up the first possible name. Repeating the letter will scroll through the names.

When an alternative currency is selected the **Exchange Rate** box will appear showing a recently entered exchange rate. If necessary, overwrite this value with the exchange rate you received and select the relevant option from the dropdown box.

**College/Service** – this will default to your own College or Service ID and cannot be amended. If it is incorrect please email [expensesonline@exeter.ac.uk](mailto:expensesonline@exeter.ac.uk).

**Claim type** – this is a critical part of the approval process. **Please refer to [Appendix B](#) for the options applicable to your College or Service and how each option from the drop down list must be used.**

**Department** – this will default to your own area within your College (this is not used in Services) and cannot be amended. If it is incorrect please email [expensesonline@esxeter.ac.uk](mailto:expensesonline@esxeter.ac.uk).

College/Service / Claim type / Department Breakdown			
College/Service	Claim type	Department	Percentage
FS	Service	[None]	100

### STEP 3B – Specific Details

**Specific details – Expense category and Expense item** – these boxes only appear when no item has been selected from the complete list on the left-hand side. *NOTE WE DO NOT RECOMMEND USING THIS ROUTE AS YOU CAN ONLY ADD ONE ITEM AND CANNOT CHANGE THE INDIVIDUAL ITEM ONCE SELECTED. INSTEAD FOLLOW THE STEPS BELOW.*

**Add Expense Items** – Select the relevant tick box or boxes on the left hand-side to open the input form for each item. The fields to be completed for this item will be added to the page.

**My Expense Items**  
Select an item below to add it to your expense sheet:

- ☐ Accommodation - London
- ☐ Accommodation - meals
- ☐ Accommodation - overseas
- ☐ Accommodation - UK
- ☐ Accommodation - other
- ☐ Books/publication
- ☐ Clothing hire
- ☐ Conference call
- ☐ Consumables
- ☐ Equipment
- ☐ Fee conference
- ☐ Fee course/...
- ☐ Fees - professional
- ☐ Fees/subscriptions
- ☐ Flight business
- ☐ Flight economy
- ☒ Fuel for hired/pool vehicles
- ☐ Gift vouchers
- ☐ Gifts/cards
- ☐ Goods for rent
- ☐ Handling/collection
- ☐ Hospitality - meals

**Reason:** [Dropdown]  
**Currency:** Pound Sterling [Dropdown]  
**Foreign currency rate chosen:** [None] [Dropdown]

**College/Service / Claim type / Department Breakdown**

College/Service	Claim type	Department	Percentage
FS [Dropdown]	Service [Dropdown]	[None] [Dropdown]	100

**Fuel for hired/pool vehicles**

For use of own vehicle claim under mileage

**Do you have a receipt:** ☐ Yes ☐ No  
**Does it include a VAT number and VAT rate:** ☐ Yes ☐ No  
**Total (Gross):** [Text Box]  
**Deduct from Advance:** [Dropdown]  
**Payment Method:** Cash/Personal Credit Card [Dropdown]  
**Narrative:** [Text Area]  
**Reason for no receipt:** [None] [Dropdown]  
**Aptos account code:\*** [Text Box]

Click on the tooltip icon beside any field for a relevant tip.

### Key points to note

- Items are listed alphabetically. If you cannot read the full item name hover over it and the full description will be displayed in a bubble box.
- You can select as many items as you want as long as they all relate to the same general details already completed at the top.
- If you select an item you must complete the details as some of the boxes are mandatory and you will be unable to save if they are left blank.
- If you select an item by mistake just untick it.
- Any key policy or information points are set out just below the item description when the fields appear on screen.

### Completing the details for an item

The specific fields for each item will vary; however the following are standard for all items except mileage (see below):

- **Do you have a receipt** – you are expected to provide a receipt and should select Yes. However if in exceptional circumstances you do not have a receipt select No and select the reason from the drop down box lower down.
- **Do you have a VAT receipt** – these buttons will appear if the item could have VAT included. This refers to UK VAT only. You should select Yes if your receipt includes a VAT number and the VAT amount and you made the purchase in the UK.
- **Amount (gross)** – the amount you are claiming
- **Deduct from Advance** – this will only be displayed if you have an advance to set the item against (see separate guide for managing advances)
- **Payment method** – this defaults to cash/personal credit card and should be left with this selected unless you are entering an item paid for by University purchasing card (see separate guide for managing purchasing cards)
- **Narrative** - this field is for entering the additional information that you want to appear against this transaction to enable approvers and budget holders reviewing financial reports to understand WHY you made the claim. Note that you do not need to enter the date (WHEN) or the item (WHAT) as this is automatically included, as is your name (WHO)
- **Aptos account code** - this field is for filling in the full Aptos account code beginning 1-XX-X-XXX-XXX..... It is a free text field with no validation. You can copy and paste from any document where the code is stored or you can type it in. If you do not know the code and it is agreed that your finance team or approver will complete the code on your behalf when they review the claim, then you can enter a note to assist in identifying the code e.g. include the 5 digit research project number. You must enter something.

Other additional details to be completed will vary from item to item. Follow the on screen tooltips and instructions.

Mileage claims are set out in detail below.

## Mileage

**Mileage**

Include mileage claims for bicycles, motorbikes etc. Select the appropriate "car" below or add a new "car" (this assists the University meet its obligations in respect of mileage). When you have completed the from and to addresses your mileage will calculate automatically.

Tick the Return to start address box lower down for automatically completing a return trip - this journey step will not be displayed but will be added in to the calculation. If you have travelled additional miles you may amend the actual miles travelled but please then complete the Additional miles reason box below.

Landrover Discovery (XXX999) ▼ Own Car ▼ [+ Add new vehicle](#)

[Close help](#)

Enter the Postcode or if permitted, any part of the address where the journey step started from then pick the address from the results.

	From	To	Distance Details	Passengers
1	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>	<a href="#">Add Passenger</a>
2	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>	<a href="#">Add Passenger</a>

[Return to start address](#)

[View the recommended route and directions on a map](#)

[Home to office deduction rules apply](#)

Deduct from Advance:	<input type="text"/>	
Narrative:	<input type="text"/>	
Additional miles:	<input type="text" value="[None]"/>	
Aptos account code:*	<input type="text"/>	

### 1. Adding a vehicle

Before you can make a claim for mileage you must register your vehicle on the system. Vehicles include cars, motorbikes and bicycles.

If your vehicle has not already been entered, i.e. not displayed as above or the one being displayed is not the one you are using, then click on **Add new vehicle** and complete the details requested for the vehicle. For bicycles enter Bicycle as the make, Bike as the model and BIKE as the registration number. Select Petrol for fuel and enter 0 for engine size.



If you are adding a new car which replaces your previous one, select Yes to prevent your old car coming up when you add future journeys, otherwise leave No selected. If any of your old cars are still showing as available, you can email [expensesonline@exeter.ac.uk](mailto:expensesonline@exeter.ac.uk) to have them removed.

Add new vehicle

General Details

Previous Car

Does this car replace a previous one?

☐ Yes
☒ No

General Details

Make\*

Ford

Model\*

Focus

Registration Number\*

FOCUS1

Unit of Measure

Miles

Engine Type\*

Diesel

Engine Size (cc)\*

1560

Vehicle Journey Rates

Financial Year

Default

☐ Vehicle Journey Rate

☒ Own Car

☐ Motorcycles

save

cancel

Vehicle Journey Rates

☐ Vehicle Journey Rate

☒ Own Car

☐ Motorcycles

☐ Bicycles

☐ Lease car - below 1400cc (1600cc if diesel)

☐ Lease car - 1401 (1601 if diesel) - 2000cc

☐ Lease car - over 2000cc

save

cancel

Please ensure that you select the appropriate vehicle journey rate – this is used in the automatic calculation of mileage x applicable rate. The current rates prevailing are set out in the Expenses and Purchasing Card Policy, which can be accessed through the system from the top right of the screen under Company Policy.

A lease car is one obtained through the University's lease car scheme.







When all the details are correct click SAVE and your vehicle will appear on screen.

## 2. Entering journey steps

All journeys in your own vehicle must be entered using postcode validation. Instructions for completion where post code validation is not possible are set out at the end of this section.

The below pop-up menu will appear when you click into the 'from' or 'to' fields to enter your journey information. By default the magnifying glass 'search' option is selected.

Enter the Postcode or if permitted, any part of the address where the journey step started from then pick the address from the results.

	From	To	Distance Details	Passengers
1	<div>Type the first 3 characters of your search term to see your results here.</div>		<div>   </div>	<div> <a href="#">Add Passenger</a>  <a href="#">Add Passenger</a></div>
2				

De  
Na

In the lower left-hand corner you will see that there are icons which when selected will automatically populate the highlighted field with either your home address or your work location. If when you do this the field populates incorrectly please email [expensesonline@exeter.ac.uk](mailto:expensesonline@exeter.ac.uk) to have your home address or work location updated. Your home address will not be identifiable as an employee home address to any other claimants.

To search for an alternative address, leaving the magnifying glass selected, enter the postcode (no space required). A list of addresses within that postcode will be returned in order for you to select the required one.

If you do not know the postcode, but do know the first line of the address, start to type that in the field instead and an automatic Address+ search will show all possible matches, enabling you to select the required one.

If the system is unable to find the address that you need to enter please email [expensesonline@exeter.ac.uk](mailto:expensesonline@exeter.ac.uk) with details.

### 3. Using the favourites feature

To simplify the process of selecting addresses, regularly used favourites can be set up. There is a selection of organisation wide favourites set centrally, but you can also add any that regularly feature in your mileage claims using this feature. These will be personal favourites and will only be visible to you.

Gold – Personal (only shown as a favourite in your favourites list).

Blue – Organisation (seen by everyone, i.e. all UOE campuses).

Enter the Postcode or if permitted, any part of the address where the journey step started from then pick the address from the results.

	From	To	Distance Details	Passengers
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<ul style="list-style-type: none"><li>★ Cornwall Campus, Penryn, TR10 9EZ</li><li>★ Streatham Campus, Exeter, EX4 4QJ</li><li>★ St Luke's Campus, Exeter, EX1 2LU</li><li>★ Knowledge Spa, Truro, TR1 3HD</li><li>★ Veysey Building, Exeter, EX2 4SG</li><li>★ Royal Devon &amp; Exeter Hospital, Exeter, EX2 5...</li><li>★ John Bull Building, Tamar Science Park, PL6 8...</li></ul>			<ul style="list-style-type: none"><li><a href="#">Add Passenger</a></li><li><a href="#">Add Passenger</a></li></ul>

Select the favourites menu icon to be presented with a dropdown list, which will contain both your own and the organisation wide favourites to choose from.
















**To add an address to your personal favourites list** - When you conduct a search, and you hover over the results a set of icons will be placed to the right of the address.

If you are sure it is the correct address, select the star icon with the green plus.

#### 4. Using the labels feature

Similar to favourites but address names can be customised which is particularly useful for giving meaningful abbreviations to your most commonly travelled to locations. Any labels that you set up are personal to you.

Enter the Postcode or if permitted, any part of the address where the journey step started from then pick the address from the results.

	From	To	Distance Details	Passengers
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	 Cornwall Campus			 <a href="#">Add Passenger</a>
2	 John Bull Building			
	 Knowledge Spa			 <a href="#">Add Passenger</a>
	 RDE Heavitree			
	 RDE Wonford			
	 St Luke's Campus			
	 Streatham Campus			
	 Veysey Building			
	 Na			

Labelled addresses will be preceded by a coloured label.

Gold – Personal (only shown in your labelled addresses list).

Blue – Organisation (labelled addresses available to everyone, i.e. all UOE campuses).

**To create a label for a specific address** - When you conduct a search, and hover over the results, a set of icons will be placed to the right of the address.

If you are sure it is the correct address, select the label icon with the green plus.



This will present a field on screen for you to enter the name you would like to give the address. Upon selecting the green tick, the address is then added to the list of personal labelled addresses.

#### 5. Calculation of mileage

As per the Expenses Policy, the system automatically calculates the shorter of office to destination and home to destination if you start at your home address.

When you have entered the addresses, the post code validated **shortest** mileage will be displayed as both the distance travelled and the recommended distance. We expect the recommended distance to be used in the majority of cases.

If however you actually travelled further due to taking an alternative route, you may overwrite the distance travelled with the mileage taken from your odometer. **You must then complete the additional miles box below by selecting from the drop down list.**

	From	To	Distance Details		Passengers
1	Streatham Campus, Exeter	Cornwall Campus, Penryn	94.80	94.80	 <a href="#">Add Passenger</a>
2	Cornwall Campus, Penryn	Streatham Campus, Exeter	110.00	94.40	 <a href="#">Add Passenger</a>

You also have the option to enter any passengers you carried in order to claim the additional passenger allowance. If the person already exists on the Expenses system you can either enter by their network ID or by searching on their surname. If the passenger doesn't exist on the system select 'Can't find what you're looking for?' to add the passenger onto the claim.

Passengers

jd413 x

Jason Duke (jd413)

Can't find who you're looking for?

Close

If you completed a return journey, having entered the From and To addresses, click the Return to start address box below and the final step will be entered automatically. Alternatively, for multiple step journeys, clicking into the From field in the next row will automatically see that field populated with what is in the previous To field.

You will see the total calculated for the mileage entered when you have saved your claim.

In the case of non-direct journeys, such as field trips on Dartmoor, where there is no defined start and end destination for periods of the journey, you should enter the start and end post code of the main journey, or stage of the journey and overwrite the total number of miles travelled in the **Distance travelled field** using the mileage recorded on your odometer.

Complete the narrative and Aptos account code boxes as for other expense items.

## Completed page of items

When you have entered all expense items under one set of general details, go to the bottom of the page and click **SAVE**. **Note that this is not submitting the claim yet.**









































If you have completed all mandatory fields, you will be taken to the Claim Details screen. If there are any items that are flagged due to certain rules built into the system, these will be displayed to you as flagged information. Click on the red cross to close the information box.

Home : My Claims : Current Claims

### Claim Details

**Page Options**  
Add Item  
Claim List  
Change View  
Print  
Submit Claim  
Help

<b>General Information</b>	
<b>Claim Name:</b>	ASHrubshall13
<b>Claim Description:</b>	Expense Claim 13:23/05/2012 - 23/05/2012
<b>Number of Items:</b>	4
<b>Claim Total:</b>	£188.49
<b>Amount Payable:</b>	£188.49

<b>Expense Items</b>																																																																																																																																																																																																																																																																																																																																																																																						
																																																																																																																																																																																																																																																																																																																																																																																						

## STEP 4 – Review your claim under CLAIM DETAILS

You will see the total of the claim and each item listed. Note that the view of individual items you see will initially be the system default view, but you can change your view and add or remove different fields. To do this click on Change View, then add or delete columns from the view.

Reference Number	Cash Advance	Claim type	Date of Expense	Expense Item	Normal Receipt	Aptos account code	Other Details	Total
24-000048		Service	23/05/2012	Software	<input type="checkbox"/>	Test2	Test2	£50.00
24-000049		Service	26/05/2012	Mileage	<input type="checkbox"/>	1-PC-G-N60-502-UPC20-A181	Meeting in Plymouth	£28.49
24-000046		Service	23/05/2012	Parking	<input checked="" type="checkbox"/>	fff	fdf	£10.00
24-000047		Service	23/05/2012	Student related expenditure	<input type="checkbox"/>	Test	Test	£100.00
								£188.49

From within the Claim Details screen you can:

Edit

Delete

View the flagged information

View details of a journey

You can also attach electronic files. Attaching scanned receipt files is optional as presently HMRC require that we retain all original receipts for staff expenses. However you can attach other useful information.

To attach a document – make sure you know where the document or email is saved, click on the attach receipts icon and browse for the file.

Please select a receipt to upload

File Name:  Browse...


save cancel

When you have located it through your file browser, click Open and then SAVE.

You will see the add receipt icon change to give the option to view the attachment or delete the attachment.

**This is useful for attaching correspondence relating to budget holder approval.**

**Sorting** – if you have a lot of items you can sort on an individual column by clicking the column description. Click once for ascending order, click again for descending order. The sort icon will appear showing which order has been applied.



Expense Item ▲
Mileage
Parking
Software
Student related expenditure

## STEP 5 – ADD additional items or START a NEW CLAIM

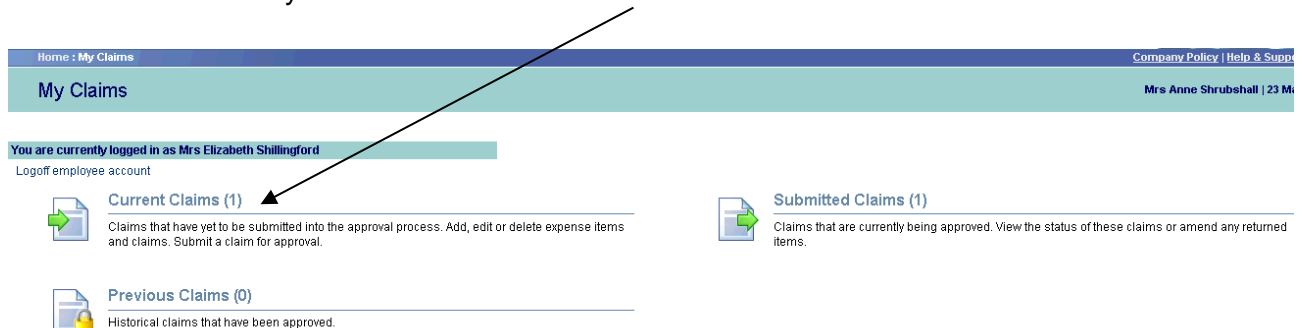
If you need to add further items because you have forgotten to include something or they were incurred on a different day or for a different reason and therefore the general details need to be different, click on **Add Item** under Page Options in the left-hand pane.

This takes you back to the **Add/Edit** item screen in STEP 3 above.

The general details will be pre-filled with the previous information and the default will be today's date. Check the details and amend as necessary, then continue to add items as before.

We recommend that you only use one **Claim Type** throughout your claim i.e. for all batches of items added. This is to speed up claim approval as if different claim types are used the claim may have to pass through multiple approval stages.

If you want to claim items with a different **Claim Type**, then start another claim, either when you have finished the first one or you can have another one open at the same time. To do this, from the main menu choose My Claims and select **Current Claims**.





Here you will see the claim name and description of the claim already in progress. You can go back into this one by clicking on the Claims Name. If you want to start a new claim select **Add Claim** from the Page Options.

The screenshot shows the 'Current Claims' page. At the top is a blue breadcrumb bar: 'Home : My Claims : Current Claims'. Below it is a light blue header with 'Current Claims'. On the left is a 'Page Options' sidebar with 'Add Claim'. The main area contains a table with one claim entry. Arrows from the text above point to the 'Add Claim' link and the 'Claim Name' column header.

		Claim Name	Claim Description	Num Items	Claim Total
		<a href="#">AShrubshall13</a>	Expense Claim 13:23/05/2012 - 23/05/2012	4	£188.49

close

Create the claim as set out in STEP 2 above by entering the claim description and saving.

Once the claim has been created you are brought back to the Current Claims list and you can then drill down into which ever claim you want to add items to – you are taken to Claim Details from which you can then add items. Note how important the Claim Description is and that you can always see how many items have been added and how much the claim is for.

This screenshot shows the 'Current Claims' page after adding a second claim. The table now has two entries. Arrows from the text above point to the 'Add Claim' link and the 'Claim Description' column header.

		Claim Name	Claim Description	Num Items	Claim Total
		<a href="#">AShrubshall13</a>	Expense Claim 13:23/05/2012 - 23/05/2012	4	£188.49
		<a href="#">AShrubshall14</a>	On-line expenses training	0	

close

## Accessing an existing claim from the Home Page

The **Add New Expenses** menu item on the Home Page takes you into an existing claim if there are any already open (defaults to earliest). The claim dropdown menu enables you to move between any of your non-submitted claims to add new a new item. This same dropdown menu enables you to move already created expense items between claims.

General Details	
Date:	26/05/2012
Reason:	
Currency:	Pound Sterling
Foreign currency rate chosen:	[None]
Claim:	AShrubshall13
Country:	United Kingdom

## STEP 6 – PRINT YOUR CLAIM

Once you are happy with the content of the claim and you are ready to submit, you will need to **PRINT** your claim so that you can attach your receipts. Note that you can skip this stage if you are only claiming mileage.

From the Claim Details page click **PRINT**.

Home : My Claims : Current Claims		Company Policy   Help & Support							
Claim Details		Mrs Anne Shrubshall							
<b>Page Options</b>									
Add Item									
Claim List									
Change View									
Print									
Submit Claim									
Help									
<b>General Information</b>									
Claim Name:	AShrubshall13	Claim Description:	Expense Claim 13:23/05/2012 - 23/05/2012						
Number of Items:	4	Claim Total:	£188.49						
Amount Payable:	£188.49	Stage:	This claim has not yet been submitted.						
<b>Expense Items</b>									
	Reference Number	Cash Advance	Claim type	Date of Expense	Expense Item	Normal Receipt	Aptos account code	Other Details	Total
	24-000048		Service	23/05/2012	Software	<input type="checkbox"/>	Test2	Test2	£50.00
	24-000049		Service	26/05/2012	Mileage	<input type="checkbox"/>	1-PC-G-N60-502-UPC20-A181	Meeting in Plymouth	£28.49
	24-000046		Service	23/05/2012	Parking	<input checked="" type="checkbox"/>	fff	fdfsf	£10.00
	24-000047		Service	23/05/2012	Student related expenditure	<input type="checkbox"/>	Test	Test	£100.00
									£188.49

This takes you into print pre-view through your internet browser from where you can print out.

print - Internet Explorer 7

https://www.sel-expenses.com/pri

File Edit View Favorites Tools Help

print

Employee Name: Mrs Anne Shrubshall Claimant Signature: \_\_\_\_\_

Date: 27 May 2012 Approval Signature: \_\_\_\_\_

Num Receipts: 1

Username: aeshrubs Claim Number: 14

College/Service	Department	Date of Expense	Expense Item	Narrative	NET	VAT	Total	Reference Number	VAT Receipt	Normal Receipt
FS		25/05/2012	Mileage	Training in Cornwall for On-line Expenses	£56.50	£0.00	£56.50	24-000050	<input type="checkbox"/>	<input type="checkbox"/>
FS		25/05/2012	Parking	Parking for training session in Cornwall	£8.33	£1.67	£10.00	24-000051	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
					£64.83	£1.67	£66.50			

The print will show the unique reference for each item and which items have a receipt.

Write the unique reference on each receipt and attach to the back of the claim. **Make sure they are secure.**

## STEP 7 – SUBMIT YOUR CLAIM

From the same Claim Details screen click **SUBMIT CLAIM** from the Page Options. You will be taken through to the final Submit Claim page. You have a final opportunity to **Cancel**. If you are happy with the claim click **SAVE**.

Submit Claim

Page Options  
Help

General Details

Claim Name: AShrubshall14

Description: On-line expenses training

save cancel ▶

You may get a warning about **flagged items** – this does not prevent you from being able to submit the claim but you may wish to Cancel and review the items again.

If you click **SAVE** you will be presented with a Declaration that sets out the basis on which you are making the claim. This is to remind you of your responsibilities in relation to expense claims, as set out in the Expenses and Purchasing Card Policy. If at this stage you wish to make an amendment to the claim prior to submission you should select Decline, which takes you back to the Claim Submission screen where you can cancel and go back and edit your claim. Otherwise select Accept.

### Declaration

I CERTIFY THAT: 1. The expenses or purchasing card items claimed comply with the University's Expenses and Purchasing Card Policy. All expenditure is incurred wholly, exclusively and necessarily in the course of the University's business and was incurred on the date specified in the claim. 2. Where a claim for mileage is made: a. The journeys detailed on this expenses claim form were undertaken in the vehicle of make, cc and registration shown and were necessarily incurred by me on University business. b. The appropriate insurance policy in respect of this vehicle is currently in force and provides cover whilst the vehicle is used on the official business of the University including the journeys listed in the claim for full third party insurance risk; injury to or death of passengers and damage to property.

[I Accept](#) [I Decline](#)

Once you have accepted the declaration you are taken through to the **Submitted Claims** screen i.e. the claim has been moved from Current Claims to Submitted Claims.

Home : My Claims : Submitted Claims Company Policy | Help & Support

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**Claim Details** Mrs Anne Shrubshall | 27 May 2012

**Page Options**

- Claim List
- Print
- Unsubmit Claim
- Change View

**General Information**

<b>Date Submitted:</b>	27 May 2012	<b>Claim Amount:</b>	£66.50
<b>Amount Payable:</b>	£66.50	<b>Current Stage:</b>	1 of 4
<b>Current Approver:</b>			

**Claim History**

Date Stamp	Entered By	Comment	Stage	Ref Num
27/05/2012 21:09:34	Mrs Anne Shrubshall	Claim Submitted.	0	
27/05/2012 21:09:34	Mrs Anne Shrubshall	The claim has been sent to the next stage and is waiting to be allocated to an approver	1	

**Expense Items**

Reference Number	Claim type	Date of Expense	Expense Item	Aplos account code	Narrative	Number of Miles	NET	VAT	Total
24-000050	Service	25/05/2012	Mileage	1-PC-G-N60-502-UPC20-A104	Training in Cornwall for On-line Expenses	146.00	£56.50	£0.00	£56.50
24-000051	Service	25/05/2012	Parking	1-PC-G-N60-502-UPC20-A104	Parking for training session in Cornwall	0.00	£8.33	£1.67	£10.00
						146.00	£64.83	£1.67	£66.50

This screen shows the Claim Details as before but has a new section showing the **Claim History**.

At this stage you do have the option to **UNSUBMIT** the claim which will put it back into progress as a **CURRENT CLAIM**. You can then make amendments and resubmit. These stages will be

included on the claim history. You can un-submit up to the point that the claim has been approved at the next stage.

If you forgot to print before submitting the claim you can also print from this screen.

## STEP 8 – Send printout and receipts to designated place/person in your College/Service

## STEP 9 – REVIEW RETURNED ITEMS

If any of the items in your claim are returned at an approval stage you will receive an email advising you of this and asking you to log on to view the returned item through **My Claims - Submitted Claims**.

### General Information

<b>Date Submitted:</b>	21 May 2012	<b>Claim Amount:</b>	£876.00
<b>Amount Payable:</b>	£876.00	<b>Current Stage:</b>	1 of 1
<b>Current Approver:</b>	Shrubshall, Mrs Anne		

### Claim History

Date Stamp	Entered By	Comment	Stage	Ref Num
21/05/2012 18:59:21	Mrs Elizabeth Shillingford	Claim Submitted.	0	
21/05/2012 18:59:21	Mrs Elizabeth Shillingford	The claim has been sent to the next stage and is waiting to be allocated to an approver	1	
21/05/2012 21:02:16		The claim has been allocated and awaiting approval by Mrs Anne Shrubshall	1	
21/05/2012 21:11:07	Mrs Anne Shrubshall	Expense Returned: Did you approach Procurement to request the supplier be set up on Aptos?	1	25-000008

Please Note: Once a returned item has been edited, deleted or disputed your approver will be automatically notified and no further action is required by yourself.

The Claim History will tell you what the query is.

The returned item will be highlighted in the list of Expense Items. You should review the item and either edit or delete the item.

If you just need to provide further information or do not agree with the reason for return you can resubmit without amendment – termed a disputed item. You will be presented with a box to complete with the additional information or the reason for returning without amendment.

### Expense Items

				Reference Number	Claim type	Date of Expense	Expense Item	Aptos account code	Narrative	Number of Miles	NET	VAT	Total
				25-000000	Service	20/05/2012	Accommodation - London	1-PC-G-N63-000	Liz test hotel with vat	0.00	£83.33	£16.67	£100.00
				25-000001	Service	20/05/2012	Fee conference	12345	Test conf fee	0.00	£123.00	£0.00	£123.00
				25-000002	Service	20/05/2012	Taxi			0.00	£9.00	£0.00	£9.00
				25-000003	Service	20/05/2012	Consumables			0.00	£10.00	£0.00	£10.00
				25-000004	Service	20/05/2012	Fuel for hired/pool vehicles			0.00	£34.00	£0.00	£34.00
				25-000005	Service	20/05/2012	Parking	12345	Parking	0.00	£4.00	£0.00	£4.00
				25-000006	Service	20/05/2012	Subsistence - meals/food purchases	12345	Set meal	0.00	£20.00	£0.00	£20.00
				25-000007	Service	20/05/2012	Accommodation - meals	123456	Test meal	0.00	£16.00	£0.00	£16.00
				25-000008	Service	20/05/2012	Equipment	15467		0.00	£455.00	£91.00	£546.00
				25-000009	Service	20/05/2012	Internet charges	56743	Test Internet charge	0.00	£4.00	£0.00	£4.00
				25-000010	Service	20/05/2012	Gift vouchers (for giving to non-staff only)	67890	Voucher for xxx	0.00	£10.00	£0.00	£10.00
										0.00	£768.33	£107.67	£876.00

## General Details

### Dispute:

No as this was a one-off emergency item.

save

cancel ►

When you have dealt with the returned items and saved, the claim will automatically be re-submitted and the claim history updated.

### Claim History

Date Stamp	Entered By	Comment	Stage	Ref No
21/05/2012 18:59:21	Mrs Elizabeth Shillingford	Claim Submitted.	0	
21/05/2012 18:59:21	Mrs Elizabeth Shillingford	The claim has been sent to the next stage and is waiting to be allocated to an approver	1	
21/05/2012 21:02:16		The claim has been allocated and awaiting approval by Mrs Anne Shrubshall	1	
21/05/2012 21:11:07	Mrs Anne Shrubshall	Expense Returned: Did you approach Procurement to request the supplier be set up on Aptos?	1	25-000008
23/05/2012 23:13:42	Mrs Anne Shrubshall	The returned expense has been disputed: No as this was a one-off emergency item.	1	25-000008

### Items Waiting Approval

Tick To Select	Department	Reference Number	Claim type	Date of Expense	Expense Item	Aptos account code	Other Details	Number of Miles	Total	VAT	NET	Additional miles	Reason for no receipt	Reason why University procurement route was not used
									0.00	0.00	0.00	0.00		

### Returned Items

Tick To Select	Corrected	Dispute	Department	Reference Number	Claim type	Date of Expense	Expense Item	Aptos account code	Other Details	Number of Miles	Total	VAT	NET	Additional miles	Reason for no receipt	Reason why University procurement route was not used
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Dispute	25-000008	Service	20/05/2012	Equipment	15467		0.00	£546.00	£91.00	£455.00			Not on aptos
										0.00	£546.00	£91.00	£455.00			

You have now successfully completed your claim submission and are waiting for it to be paid. You will receive an email when it has been passed for payment and is due to be paid in the next payment run. It will move from **Submitted Claims** to **Previous Claims**.

Expenses are paid weekly – all claims processed for payment by close of business on Tuesday will be paid to your bank account by Friday of that week unless there are bank holiday/other notified arrangements.

Remember you can view the status of your claims at any time under **My Claims**.

[Home : My Claims](#)
[Company Policy](#) | [Help & Support](#) | [Exit](#)

**My Claims**
Mrs Anne Shrubshall | 27 May 2012

**Current Claims (2)**

Claims that have yet to be submitted into the approval process. Add, edit or delete expense items and claims. Submit a claim for approval.

**Submitted Claims (0)**

Claims that are currently being approved. View the status of these claims or amend any returned items.

**Previous Claims (6)**

Historical claims that have been approved.

## MOVING AROUND THE SYSTEM

When you have logged on to expenses you are taken to the Home Page and will see the following icons. There will be additional items if you hold a University purchasing card, apply for advances or approve claims. Click on an icon to access further menus.



You always know where you are by looking at the information in white at the top of the screen.

You can access the University Expenses and Purchasing Card Policy direct from the system wherever you are.

You can get access on-line guidance wherever you are.

You can exit Expenses wherever you are.

When you have moved down into one of the menus, look for on screen instructions and other options.

At the top of the screen.

In the panel on the left.

At the bottom of the page.

Use a calendar for dates

Click on tooltips.

The screenshot shows a web form titled "Add / Edit Expense". At the top, a blue banner reads: "Before you can continue, please confirm the action required at the bottom of your screen." Below this is a light blue header with the title "Add / Edit Expense".

On the left is a sidebar with two sections:

- Page Options**: "Clear General Details", "Help".
- My Expense Items**: "Select an item below to add it to your expense sheet:", a checkbox for "Accomm - London".

The main form area is titled "General Details" and contains four rows of input fields:

- Date:** A text box containing "26/05/2012" with a calendar icon to its right.
- Reason:** A text box with a dropdown arrow.
- Currency:** A text box containing "Pound Sterling" with a dropdown arrow.
- Foreign currency rate chosen:** A text box containing "[None]" with a dropdown arrow.

To the right of each input field is a circular tooltip icon with a question mark.

At the bottom left are two buttons: "save" and "cancel ►".

Annotations with arrows point to various elements:

- "At the top of the screen." points to the blue banner.
- "In the panel on the left." points to the "My Expense Items" section.
- "At the bottom of the page." points to the "save" and "cancel" buttons.
- "Use a calendar for dates" points to the calendar icon next to the Date field.
- "Click on tooltips." points to the first tooltip icon.
- "Click on drop down lists" points to the dropdown arrow of the "Foreign currency rate chosen" field.



To move out of the screen to a different option when there is no SAVE or CANCEL action required, use the bar at the top and click on a step further up the menu.

**We do not recommend using the internet browser back button.**

Home : My Claims : Current Claims

## Claim Details

**Page Options**

- Add Item
- Claim List
- Change View
- Print
- Submit Claim
- Help

**General Information**

<b>Claim Name:</b>	AShrubshall13	<b>Claim Description:</b>	Expense Claim 13:23/05/2012 - 23/05/2012
<b>Number of Items:</b>	3	<b>Claim Total:</b>	£160.00
<b>Amount Payable:</b>	£160.00	<b>Stage:</b>	This claim has not yet been submitted.

**Expense Items**

						Reference Number	Cash Advance	Claim type	Date of Expense	Expense Item
						24-000048		Service	23/05/2012	Software
						24-000047		Service	23/05/2012	Student related expenditure
						24-000046		Service	23/05/2012	Parking

Some screens will have other icons displayed which give options relating to the line they are against. Hover over the icon to see what it does – click on the icon to action. Many of them are standard across screens. E.g. edit, delete, view.

Other icons are specific to the screen. E.g. flag information.

## USE OF CLAIM TYPES IN APPROVAL PROCESS

All Colleges have the following claim types available:

College	For general College claims
RKT allocation	For claims against internal allocations made by the Research and Knowledge Transfer Office – the budget holder will have been notified that RKT will approve these

### College specific claim types

Research	<b>CHUMS, CSSIS and CEMPS</b> For externally funded research (the Aptos GR ledger) – the Aptos account code will have a 5 digit project number in the code.
Centre for Medical History	<b>CHUMS</b> specifically for research claims relating to the Centre for Medical History
Partnership	<b>CSSIS</b> – Graduate School of Education only for school related visits

### Services

Service	All Professional Services default
PR/Event	Specific to <b>Communications and Marketing</b> for claims against a PR or Event budget